



## **STATE OF INDIANA**

### **Request for Information 15-007**

**INDIANA DEPARTMENT OF ADMINISTRATION**

**On Behalf Of**

### **Indiana Family and Social Services Administration**

**Solicitation For:**

**Advertising and Public Relations Services for HIP 2.0 Public  
Education**

**Response Due Date: August 15, 2014**

Matt Robinson, Senior Account Manager  
Indiana Department of Administration  
Procurement Division  
402 W. Washington St., Room W478  
Indianapolis, Indiana 46204

## **REQUEST FOR INFORMATION 15-007**

### **INTRODUCTION**

This is a Request for Information (RFI) issued by the Indiana Department of Administration (IDOA) in conjunction with the Indiana Family and Social Services Administration (FSSA) and the Indiana Office of Medicaid Policy and Planning (OMPP). This RFI requests responses from potential contractors with experience providing Advertising and Public Relations (PR) services. These services may be required as part of the public education efforts for the new Healthy Indiana Plan (HIP) 2.0, which is currently subject to Centers for Medicare & Medicaid Services (CMS) approval. The responses will provide FSSA with insight into the capabilities of vendors that can potentially perform duties related to the HIP 2.0 public education marketing campaign. It is the intent of IDOA to solicit responses to this RFI in accordance with the statement of work and specifications contained in this document. The State reserves the right to directly award a contract for Advertising and PR Services for HIP 2.0 Public Education based on responses to this RFI. However, the State does not guarantee that a contract will result directly from this RFI. Neither this RFI nor any response (proposal) submitted hereto is to be construed as a legal offer.

### **BACKGROUND**

Pending CMS approval, the State of Indiana will be implementing HIP 2.0, a consumer-driven health care coverage program for low-income adults. HIP 2.0 will be an option for Hoosiers aged 19 to 64 with incomes up to 138 percent of the federal poverty level. It is estimated that over 550,000 people throughout the state are eligible for HIP 2.0.

The expected services for HIP 2.0 public education include PR account management and campaign development and design. Major tasks include:

1. Management: Provide PR account management for the HIP 2.0 public education campaign.
  - Assist in organizing stakeholder group and facilitating ongoing information dissemination among this group
  - Project organization, planning and recordkeeping
  - Oversee media buying through the State's approved Quantity Purchase Agreement (QPA) vendor
  - Attend weekly project meetings and weekly update meetings with FSSA's Director of Communications
  - Write supporting materials such as updates to stakeholder group and email/text updates to opt-ins
  - Direct the creative process, using state resources/staff whenever appropriate
  - Evaluate and coordinate event sponsorships/participation
  - Coordinate and staff community-based stakeholder training (3-5 presenters/trainers who would traverse the state attending public events

- where they would talk about HIP 2.0 and train people in the communities)
- Develop tracking/metrics for the project and keep current information

2. Production: Provide campaign development and design (where applicable).

- 30-second TV spot(s)
- 30-second Radio spot(s)
- Outdoor (FSSA staff design)
- Digital ads (FSSA staff design)
- Bus advertising (FSSA staff design)
- Postcards (FSSA staff design)
- Brochures (FSSA staff design)

FSSA staff designers will have primary responsibilities for executing design portion of items labeled “FSSA staff design”. Contractor is expected to coordinate and work with FSSA staff designers on these items.

The following tasks are excluded from the Scope of Work:

- Media relations
- Media monitoring
- Internal training
- Member notices
- Legislative strategy

The State is interested in soliciting information from qualified advertising/PR vendors capable of leveraging experience with other state government agencies to provide the services described.

The State is seeking to evaluate the potential of contracting with an advertising/PR firm for HIP 2.0 public education by learning more about the following:

- Vendor qualifications
- Vendor experience in projects of similar size and scope
- Proposed staffing plan
- Proposed work plan and ability to complete tasks listed in the Scope of Work
- Sample deliverables from former clients
- References
- Pricing

## **OBJECTIVES**

The goal of this RFI is to solicit proposals to engage a Contractor to provide advertising and PR services for HIP 2.0 public education. Respondents will be asked to provide information regarding their experience providing such services to other state agencies and their plans for performing services for HIP 2.0. Further, Respondents will be asked to provide business and pricing information for the services described herein. Respondent proposals will be used to collect information that will allow the State to make a decision on whether to engage a Vendor for future contracting for advertising and PR services for

HIP 2.0 public education. The State reserves the right to award a contract directly based on this RFI. If the State exercises this right, the State will award a contract to the Respondent whose proposal, conforming to this RFI, is most advantageous to the State, price and other factors considered. However, the State does not guarantee that a contract will result directly from this RFI.

### **DETAILED SCOPE AND DELIVERABLES**

The Contractor shall assist FSSA with PR account management and campaign development and design for the HIP 2.0 program. The services requested in this RFI are expected to last eight months, but this timeframe is subject to change. In consideration of this RFI, the vendor shall provide the following services:

1. Management: Provide PR account management for HIP 2.0 public education campaign.
  - a) Contractor shall assist in organizing an external stakeholder group, which may include enrollment organizations, managed care entities, provider groups etc. Contractor will be responsible for facilitating ongoing information dissemination among this group of intermediary communications.
  - b) Contractor shall perform project organization, planning and recordkeeping. Contractor shall conduct project management, including putting together a project plan, and ensure tasks are completed in conjunction with State's timeline.
  - c) Contractor shall coordinate media buying through the State's approved QPA vendor for media buys. Contractor shall work with the QPA vendor to create a plan, which includes details of the media mix, the specific media vehicles and the media schedule.
  - d) Contractor shall attend weekly project meetings and weekly update meetings in-person with the FSSA Director of Communications to review the status of current projects and address programmatic details and issues to ensure timely delivery and successful outcomes of all campaigns.
  - e) Contractor shall write supporting materials such as updates to stakeholder groups and email/text updates to opt-ins.
  - f) Contractor shall manage the creative process, using state resources/staff whenever appropriate. Contractor shall provide creative services based on target audience and potential target audience profile. Contractor shall evaluate all available media and provide recommendations for media mix in terms of cost, reach and fit.
  - g) Contractor shall evaluate and coordinate event sponsorships/participation. Contractor shall propose a list of events and coordinate participation (vendor or FSSA staff) in such events.
  - h) Contractor shall coordinate and staff community-based stakeholder training (3-5 presenters/trainers who would traverse the state attending public events where they would talk about HIP 2.0 and train people in the communities) managing the logistics of these events as well as the

assembling/planning the content that will be delivered.

- i) Contractor shall develop tracking/metrics for the project, including a weekly project status report, and keep current information.

2. Production: Campaign development and design.

- a) Contractor shall produce, develop and/or design the following:
  - One (1) 30-second TV spot(s)
  - Two to three (2-3) 30-second Radio spot(s)
  - Outdoor (FSSA staff design)
  - Digital advertising (FSSA staff design)
  - Bus advertising (FSSA staff design)
  - Postcards (FSSA staff design)
  - Brochures (FSSA staff design)

Proposed quantities are estimates and subject to change.

FSSA staff designers will have primary responsibilities for executing design portion of items labeled “FSSA staff design”. Contractor is expected to coordinate and work with FSSA staff designers on these items.

- b) Contractor shall prepare preliminary creative materials, as planned and scheduled, and present them to the State for approval. In preparing creative material of any type, no fewer than two (2) optional creative approaches shall be submitted. Additional approaches may be requested by the State at any time during the review and approval process.
- c) Contractor shall provide electronic and print or recorded copies of all final advertising and promotional materials.

3. Project Timeline: The following high-level timeline is the tentative PR/Marketing timeline for HIP 2.0 Public Education. If a contract results from this RFI, it is expected to commence on Oct. 1, 2014 and last roughly eight (8) months. The State reserves the right to modify the timeline at any time.

	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15
Stakeholder meetings																
Stakeholder action plans*																
HIP.IN/gov updates																
Opt-in text messaging																
Brochure design																
Brochure distribution																
Media outreach/updates																
Billboard design																
Billboards in production																
Bus advertising design																
Bus advertising in production																
TV/Radio production																
TV/Radio ad campaign																
Digital ad design																
Digital ads in production																
Event sponsorships																
Community based stakeholder training																
Promote HIP help line*																
Live chat button (help line)*																
Postcards to existing clients (design)																
Postcards to existing clients (mailed)																
Executive road show*																

\* Denotes tasks which will not be performed directly by Advertising/PR Contractor.

## **RESPONSE FORMAT AND ATTACHMENTS**

Respondents should submit responses to the RFI describing how they will meet the specific requirements of this RFI and the detailed scope and deliverables included within.

Due to the significant constraints of the implementation timeline for HIP 2.0, the State will require a streamlined response. In the interest of time, the State has a strong desire to receive and review condensed, content rich responses. To maintain this objectivity and brevity, we have established a structured review process and format for vendor responses to the RFI requirements.

All narrative responses must be provided to the State in Microsoft Word format. Although we encourage vendors to present their strongest case, vendors must structure their response according to the sections outlined below to facilitate the State's evaluation of the responses we expect to receive. Narrative responses shall range from ten to fifteen

(10-15) pages and shall be limited to fifteen (15) core pages written with a font size no smaller than 10 pt, excluding the appendix, transmittal letter and cost proposal.

The following questions must be addressed within each section and will be used in the evaluation of the responses:

<b>Section</b>	<b>Questions</b>
Qualifications	<ul style="list-style-type: none"><li>- What are your qualifications for a project of this size and scope?</li><li>- What differentiates you from other firms in your ability to complete this project?</li></ul>
Experience	<ul style="list-style-type: none"><li>- Have you had success managing a similar project? Please detail.</li><li>- Have you successfully managed a project for another state agency? Please detail.</li><li>- Have you had experience managing a state-wide public education project or anything similar? Please explain.</li></ul>
Staffing	<ul style="list-style-type: none"><li>- How would you staff the project? Who would the State's primary contact person be?</li><li>- How would you recruit the presenters for the community-based stakeholder training and train them?</li><li>- Please include resumes for key employees who would staff this account, if awarded.</li></ul>
Work Plan	<ul style="list-style-type: none"><li>- How would you organize this project in order to be able to manage the workload?</li><li>- How would you get started? Describe your implementation plan.</li><li>- How would you oversee media buying, which will be conducted through the State's media buying vendor?</li><li>- How would you manage the creative process, particularly the production of television and radio advertising? Would you require subcontractors (audio/video production)? What successes have you had in this regard?</li><li>- How would you evaluate and coordinate event sponsorships/participation?</li><li>- What kind of metrics would you track for the project? Provide sample reports in an appendix.</li></ul>
Past Sample Deliverables	<ul style="list-style-type: none"><li>- Provide sample PR/Marketing materials created for projects of a similar nature and size in an appendix</li></ul>
References	<ul style="list-style-type: none"><li>- Please provide two references (name, organization, phone, title, email). At least one of the references should be able to speak to the following areas:<ul style="list-style-type: none"><li>o Respondent's experience in providing PR account</li></ul></li></ul>

- management and/or campaign development and design.
- Respondent's experience successfully completing a similar project in a timely manner and within budget

The following attachments are included with this RFI, and must be incorporated into your response as applicable. All Respondents must complete Attachment A (Cost Proposal Response Template) and include a signed Transmittal Letter. The Transmittal Letter must clearly identify for the State's consideration any proposed changes to the sample contract.

Attachment	Description
Attachment A	Cost Proposal Response Template (RESPONSE REQUIRED)
Attachment B	Sample Contract (ACCEPTANCE REQUIRED)

## **RESPONSE SUBMISSION INSTRUCTIONS**

Firms interested in providing information to IDOA and FSSA should submit responses via email to Matt Robinson at [marobinson@idoa.in.gov](mailto:marobinson@idoa.in.gov).

All responses must be received no later than **3:00 p.m. Eastern Time on August 15, 2014**. The subject line of the email submission must clearly state the following:

**“RESPONSE TO REQUEST FOR INFORMATION 15-007”**

Any information received after the due date and time will not be considered.

Responses will be considered public information once a contract(s) is awarded. If a contract is not awarded, the responses are considered public once the decision is made.

No more than one proposal per Respondent may be submitted.

The State accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.

**Question/Inquiry Process:** All questions/inquiries regarding this RFI must be submitted in writing by the deadline of **3:00 p.m. Eastern Time on August 4, 2014**.

Questions/Inquiries may be submitted via email to [marobinson@idoa.in.gov](mailto:marobinson@idoa.in.gov) and must be received by Procurement Division by the time and date indicated above.

Questions/Inquiries will be answered on a rolling basis as they are submitted to the Procurement Division, so Vendors are encouraged to submit questions/inquiries prior to the deadline specified above.



The Procurement Division personnel will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted to the IDOA website on a rolling basis. The question/inquiry and answer link will become active after initial responses to questions have been compiled. Only answers posted on the IDOA website will be considered official and valid by the State. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employees.

Please note that Matt Robinson is the State's single point of contact for this RFI. **Inquiries are not to be directed to any staff member of FSSA.** Such action may disqualify Respondent from further consideration for a contract resulting from this RFI.

If it becomes necessary to revise any part of this RFI, or if additional information is necessary for a clearer interpretation of provisions of this RFI prior to the due date for submissions, an addendum will be posted on the IDOA website.

**Pricing:** Pricing on this RFI must be firm and remain open for a period of not less than 180 days from the submission due date.

Please provide your pricing proposal by populating the Cost Proposal (Attachment A). Submit Attachment A in Microsoft Excel format.

**Clarifications and Discussions:** The State reserves the right to request clarifications on information submitted to the State. The State also reserves the right to conduct discussions, either oral or written, with Respondents. These discussions could include requests for additional information, requests for cost or technical proposal revision, etc. Additionally, in conducting discussions, the State may use information derived from proposals submitted by competing Respondents only if the identity of the Respondent providing the information is not disclosed to others. Discussions, along with negotiations with Respondents may be conducted for any appropriate purpose.

The Procurement Division will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

A sample contract is provided in Attachment B. Any requested changes to the sample contract must be submitted with your response and included in your transmittal letter. The State reserves the right to reject any of these requested changes.

The State may request best and final offers from those Respondents determined by the State to be reasonably viable for contract award. However, the State reserves the right to award a contract on the basis of initial proposals received. Therefore, each proposal should contain the Respondent's best terms from a price and technical standpoint.

Following evaluation of the best and final offers, the State may select for final contract negotiations/execution the offers that are most advantageous, considering cost and the

evaluation criteria in this RFI.

**Key Dates:** The following timeline is only an illustration of this RFI process. The dates associated with each step are not to be considered binding. These dates are commonly subject to change.

***Anticipated RFI Dates:***

Activity	Date
Issue of RFI	July 28, 2014
Deadline to Submit Written Questions (3pm Eastern Time)	August 4, 2014
Final response to Written Questions/RFI Amendments (Rolling basis)	August 8, 2014
Due Date for Submissions	August 15, 2014
<b><i>The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.</i></b>	
Oral Presentations (If invited)	August 28, 2014
Contract Award (If awarded)	September 12, 2014

**EVALUATION CRITERIA**

RFI submissions will be evaluated by the State, and the State reserves the right to award a contract directly based on responses to this RFI. However, the State does not guarantee that a contract will result directly from this RFI. Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the RFI in a cost-effective manner. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category. The points associated with each category are indicated following the category name (total maximum points = 100). If any one or more of the listed criteria on which the responses to this RFI will be evaluated are found to be inconsistent or incompatible with applicable federal laws, regulations or policies, the specific criterion or criteria will be disregarded and the responses will be evaluated and scored without taking into account such criterion or criteria.

***Summary of Evaluation Criteria:***

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	<b>80 points</b>

3. Pricing (Cost Proposal)	<b>20 points</b>
----------------------------	------------------

### Step 1

In this step proposals will be evaluated only against Criteria 1 to ensure that they adhere to Mandatory Requirements. Any proposals not meeting the Mandatory Requirements will be disqualified.

### Step 2

The proposals that meet the Mandatory Requirements will then be scored based on Criteria 2 and 3 ONLY. This scoring will have a maximum possible score of 100 points. All proposals will be ranked on the basis of their combined scores for Criteria 2 and 3 ONLY. This ranking will be used to create a “short list”. Any proposal not making the “short list” will not be considered for any further evaluation.

Step 2 may include one or more rounds of proposal discussions focused on cost and other proposal elements.

**Note on Oral Presentations:** Proposal discussions may include oral presentations, if the State deems it necessary and the Vendor is invited by the State. All Vendors submitting a proposal must be available for oral presentations on the date specified in the Key Dates section of this RFI. Oral presentations will be held at the Indiana Government Center South at 402 W. Washington St., Indianapolis, IN.

### Step 3

If the State conducts additional rounds of discussions and a BAFO round which lead to changes in either the technical or cost proposal for the short listed Respondents, their scores will be recomputed.

The section below describes the different evaluation criteria.

#### Adherence to Requirements – Pass/Fail

Respondents passing this category move to Phase 2 and proposal is evaluated for Management Assessment/Quality and Cost.

#### Management Assessment/Quality - 80 points

#### Pricing – 20 points

Pricing will be measured against the State’s budget (\$250,000) for this scope of work. Cost scoring points will be assigned as follows:

- Points will be awarded on a graduated scale, with maximum points (20) going to

the Respondent with the lowest Total Proposal Cost. Points will be allocated to the other Respondents proportionately.

- Respondents who meet the State's budget will receive zero (0) cost points.
- Respondents who exceed the State's budget will receive negative cost points.

The Commissioner of IDOA will, in the exercise of her sole discretion, determine which RFI submission(s) offer the best means of servicing the interests of the State. The exercise of this discretion will be final.